



## QUICKSTART GUIDE: MyPlans. CBIZ.com

Welcome to your CBIZ Benefit Accounts Online Portal. This one-stop portal gives you 24/7 access to view information and manage your flexible benefits plans. It enables you to:

**Pg. 3** - File a claim online

**Pg. 3** - Upload receipts and track expenses

**Pg. 4** - View up-to-the-minute account balances

**Pg. 5** - View your account activity, claims history, and payment (reimbursement) history

**Pg. 6** - Report a lost/stolen card and request a new one

**Pg. 7** - Update your personal profile information

**Pg. 8** - Change your login ID and/or password

**Pg. 8** - Download plan information, forms, and notifications

**The portal is designed to be easy to use and convenient. You have your choice of two ways to navigate this site:**

1. Work from sections within the Home Page
2. Hover over or click on the four tabs at the top of the page

## LOG ON TO THE HOME PAGE

1. Go to <https://myplans.cbiz.com>.
2. Locate **New User?** in the bottom left corner of the page.
3. Click on **Get Started**.
4. Follow the instructions for creating a login.

The screenshot shows a 'Login' page with three main sections. The 'Existing Users' section has a 'Username' input field, a 'Forgot Username?' link, and a blue 'Next' button. The 'Setting up a New Account?' section has a text prompt 'Enter a code given to you, or create a new account', a 'Code' input field with a refresh icon, and a blue 'Next' button. The 'New User?' section has a text prompt 'Create your new username and password' and a blue 'Get Started' button.

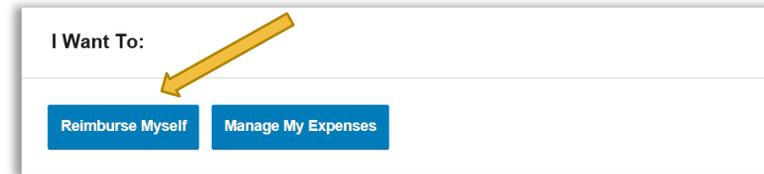
## HOME PAGE FEATURES

- Find frequently used features in the **I Want To:** section.
- Easily view your **Available Balance**.
  - Click on the account name to view account activity.
- Alerts will display in the **Tasks** section.
- See key account information under **Quick View**.
- Find more features when you click on one of the tabs at the top of the page.
  - Home
  - Accounts
  - Tools & Support
  - Message Center

The screenshot shows the 'Home' page dashboard. At the top are navigation tabs: 'Home' (selected), 'Accounts', 'Tools & Support', and 'Message Center' with a notification icon. Below is a green 'Welcome' banner with the text 'We're Making It Easy to Manage Your Healthcare Expenses' and a magnifying glass icon. The 'I Want To:' section contains two buttons: 'Reimburse Myself' and 'Manage My Expenses'. The 'Accounts' section shows a table for 'PY 2021-01-01 - 2021-12-31' with one row: '2021 Limited Reimbursement FSA' with an 'AVAILABLE' balance of '\$0.00'. The 'Tasks' section shows 'No current Tasks'.

## FILE A CLAIM AND UPLOAD A RECEIPT

1. On the **Home Page**, select **Reimburse Myself** under the **I want to:** section.
2. The claim filing wizard will walk you through the process allowing you to enter the needed information and prompt you to upload an image of your receipt.
3. For submitting more than one claim, click **Add Another**, from the **Transaction Summary** page.
4. When all claims are entered in **the Transaction Summary**, agree to the terms and conditions then click **Submit** to send the claims for processing.
5. A **Claim Confirmation** page displays. You may print the **Claim Confirmation Form** as a record of your submission.



**NOTE:** If you see a **Receipts Needed** link in the Tasks section of your Home Page, click on it. You will be taken to the **Claims** page where you can see the claims that require documentation.

The screenshot shows a web interface with a navigation bar at the top containing "Home", "Accounts" (highlighted), "Tools & Support", and "Message Center 2". Below the navigation bar is the heading "Accounts / Receipts Needed". Underneath is a section titled "Receipts Needed" containing a table with the following data:

DATE OF SERVICE	ACCOUNT	MERCHANT / PROVIDER	RECIPIENT	CLAIM AMOUNT	RECEIPT STATUS	
3/2/2019	Limited Health...	University...	Uma Ballard	\$6.50	Required	<a href="#">View Confirmation</a> <a href="#">Upload Receipt(s)</a>

## VIEW CURRENT ACCOUNT BALANCES AND ACTIVITY

1. For the current account balance. View the **Accounts** section on the **Home Page**.
2. For all Account Activity, click on the **Accounts** tab from the Home Page to bring you to the **Account Summary** page. Then you may select the underlined dollar amounts for more detail.

The screenshot shows a web interface for viewing account balances and activity. It is divided into two main sections: 'Accounts' and 'Account Summary'.

**Accounts Section:**

HEALTH SAVINGS ACCOUNT		01/01/2018 - 12/31/2018	
	AVAILABLE		AVAILABLE
Cash Account	\$2,012.50	Limited Health Care Flex...	\$2,445.95
Advance	\$0.00	Dependent Care Flexible...	\$1,918.30
Investment Account	\$795.00	Parking Reimbursement...	\$1,280.00

**Account Summary Section:**

The information displayed on the Account Summary page will vary depending upon your specific healthcare benefits. [View More](#)

**Health Savings Account**

<b>TOTAL AVAILABLE BALANCE</b>	<b>\$5,153.00</b>
AVAILABLE CASH BALANCE	INVESTMENT BALANCE
\$4,050.00	\$1,103.00 * Current as of 3/13/2019

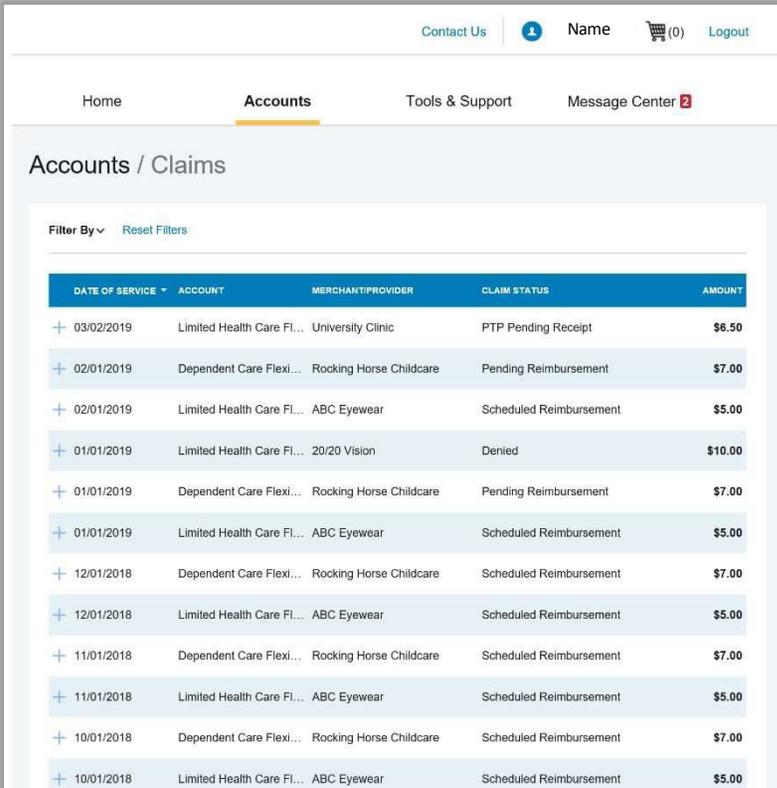
01/01/2019 - 12/31/2019 ESTIMATED PER PAY PERIOD DEDUCTION: \$1,161.66

ACCOUNT	ELIGIBLE AMOUNT	SUBMITTED CLAIMS	PAID	PENDING	DENIED	AVAILABLE BALANCE
+ Limited Health Care Flexible Spend...	\$2,700.00	\$26.50	\$0.00	\$16.50	\$10.00	\$2,683.50
+ Dependent Care Flexible Spending...	\$5,000.00	\$14.00	\$0.00	\$14.00	\$0.00	(\$14.00)
+ Parking Reimbursement Account	\$3,120.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
+ Transit Pass Reimbursement Account	\$3,120.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

NOTE: You can see election details by clicking+ to expand the line item for each account.

## VIEW CLAIMS HISTORY AND STATUS

1. From the **Home Page**, click on the **Accounts Tab**, and then click on the **Claims** link to see your claims history.
2. You can apply filters from the top of the screen and filter by the following:
  - Plan year
  - Account type
  - Claim status
  - Receipt status
3. By clicking on the claim line, you can expand the data to display additional claim details.

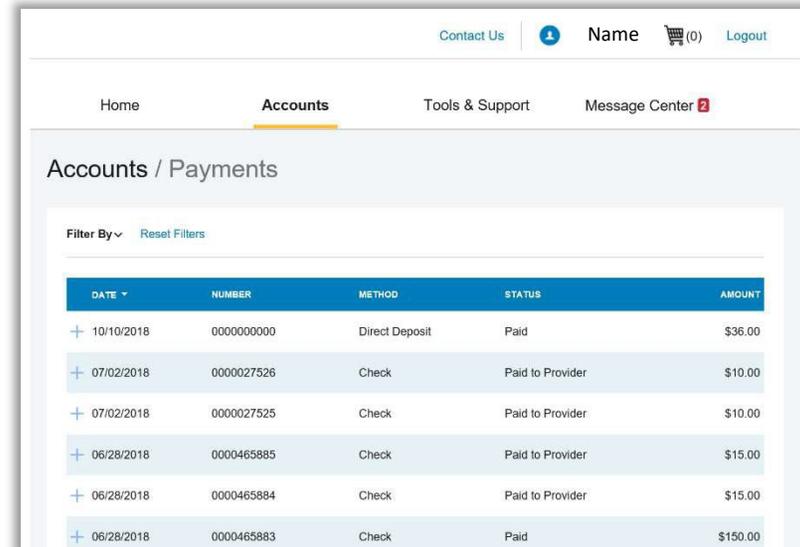


The screenshot displays the 'Accounts / Claims' page. At the top, there are navigation links: 'Home', 'Accounts' (highlighted), 'Tools & Support', and 'Message Center 2'. Below the navigation is a 'Filter By' dropdown menu and a 'Reset Filters' link. The main content is a table with the following columns: 'DATE OF SERVICE', 'ACCOUNT', 'MERCHANT/PROVIDER', 'CLAIM STATUS', and 'AMOUNT'. The table lists 13 claims with their respective details.

DATE OF SERVICE	ACCOUNT	MERCHANT/PROVIDER	CLAIM STATUS	AMOUNT
+ 03/02/2019	Limited Health Care FL...	University Clinic	PTP Pending Receipt	\$6.50
+ 02/01/2019	Dependent Care Flexi...	Rocking Horse Childcare	Pending Reimbursement	\$7.00
+ 02/01/2019	Limited Health Care FL...	ABC Eyewear	Scheduled Reimbursement	\$5.00
+ 01/01/2019	Limited Health Care FL...	20/20 Vision	Denied	\$10.00
+ 01/01/2019	Dependent Care Flexi...	Rocking Horse Childcare	Pending Reimbursement	\$7.00
+ 01/01/2019	Limited Health Care FL...	ABC Eyewear	Scheduled Reimbursement	\$5.00
+ 12/01/2018	Dependent Care Flexi...	Rocking Horse Childcare	Scheduled Reimbursement	\$7.00
+ 12/01/2018	Limited Health Care FL...	ABC Eyewear	Scheduled Reimbursement	\$5.00
+ 11/01/2018	Dependent Care Flexi...	Rocking Horse Childcare	Scheduled Reimbursement	\$7.00
+ 11/01/2018	Limited Health Care FL...	ABC Eyewear	Scheduled Reimbursement	\$5.00
+ 10/01/2018	Dependent Care Flexi...	Rocking Horse Childcare	Scheduled Reimbursement	\$7.00
+ 10/01/2018	Limited Health Care FL...	ABC Eyewear	Scheduled Reimbursement	\$5.00

## VIEW PAYMENT (REIMBURSEMENT) HISTORY

1. From the **Home Page**, under the **Accounts** tab, click **Payments**.
  - You will see reimbursement payments made to date, including debit card transactions.
2. By clicking on the line of a payment, you can expand the information to display additional details about the transaction.

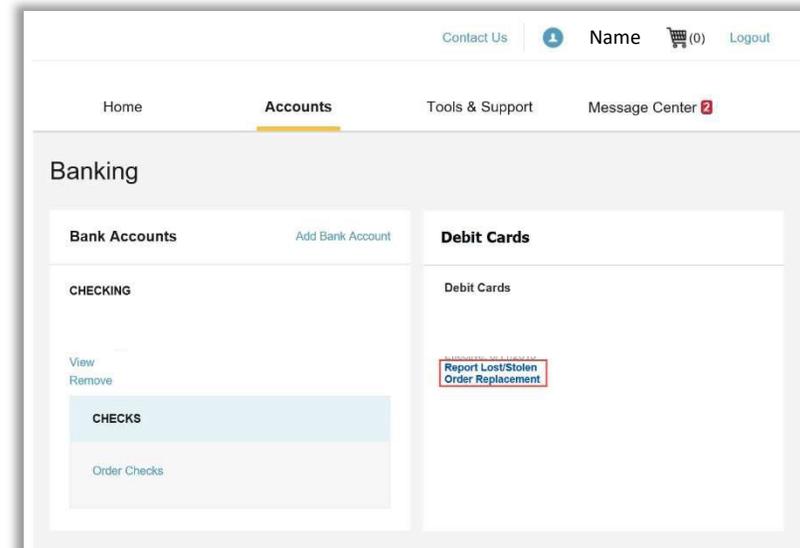


The screenshot shows the 'Accounts / Payments' page. At the top, there are navigation links: 'Home', 'Accounts' (highlighted), 'Tools & Support', and 'Message Center 2'. Below the navigation is a 'Filter By' dropdown and a 'Reset Filters' link. The main content is a table with the following data:

DATE	NUMBER	METHOD	STATUS	AMOUNT
+ 10/10/2018	0000000000	Direct Deposit	Paid	\$36.00
+ 07/02/2018	0000027526	Check	Paid to Provider	\$10.00
+ 07/02/2018	0000027525	Check	Paid to Provider	\$10.00
+ 06/28/2018	0000465885	Check	Paid to Provider	\$15.00
+ 06/28/2018	0000465884	Check	Paid to Provider	\$15.00
+ 06/28/2018	0000465883	Check	Paid	\$150.00

## REPORT A DEBIT CARD MISSING AND/OR REQUEST A NEW CARD

1. From the **Home Page**, under the **Accounts Tab**, click the **Banking** link.
2. Under the Debit Cards column, click **Report Lost/Stolen** or **Order Replacement** and follow the instructions.



The screenshot shows the 'Banking' page. At the top, there are navigation links: 'Home', 'Accounts' (highlighted), 'Tools & Support', and 'Message Center 2'. Below the navigation is a 'Bank Accounts' section with an 'Add Bank Account' link and a 'CHECKING' section with 'View' and 'Remove' links. To the right is a 'Debit Cards' section with a 'Report Lost/Stolen Order Replacement' link highlighted in a red box.

## UPDATE PERSONAL PROFILE

1. From the **Home Page**, under the **Accounts Tab**, you will find links to update profile information.
2. Click the appropriate link under Profile to update accordingly:
  - Update Profile
  - Add/Update Dependent
  - Add Beneficiary

*Note: Some profile changes will require you to answer an additional security question.*

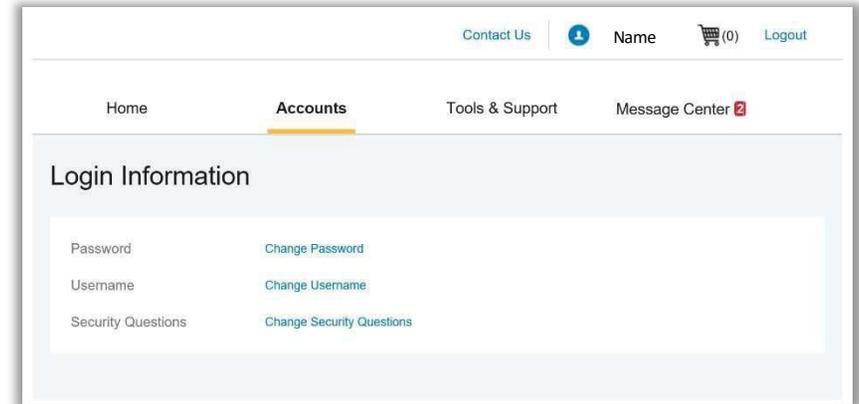
3. Complete your changes in the online form.
4. Click **Submit**.

The screenshot displays a web application interface for profile management. At the top, there are navigation links: 'Contact Us', a user profile icon labeled 'Name', a shopping cart icon labeled '(0)', and 'Logout'. Below this is a secondary navigation bar with 'Home', 'Accounts' (highlighted), 'Tools & Support', and 'Message Center 2'. The main content area is titled 'Profile / Profile Summary' and is divided into several sections:

- Name:** Includes a link to 'Update Profile'.
- Dependent Name:** Includes a link to 'Add Dependent'.
- UMA BALLARD:** Shows 'Home Address' (6029 Etiam Av, Wieze, MN 83483, United States) and 'Mailing Address' (6029 Etiam Av, Wieze, MN 83483, United States). Below this is an 'Unspecified' field with a '131' value and a '...' icon.
- JONATHAN BALLARD:** Shows 'Birth Date: 5/2/2015' and 'Student: No', with a 'View / Update' link.
- Beneficiaries:** Includes a link to 'Add Beneficiary' and a message 'No beneficiaries'.

## CHANGE LOGIN OR PASSWORD

1. From the **Home Page**, click on the **Accounts Tab**, and click **Login Information**.
2. Follow the instructions on the screen.
3. Click **Save**.



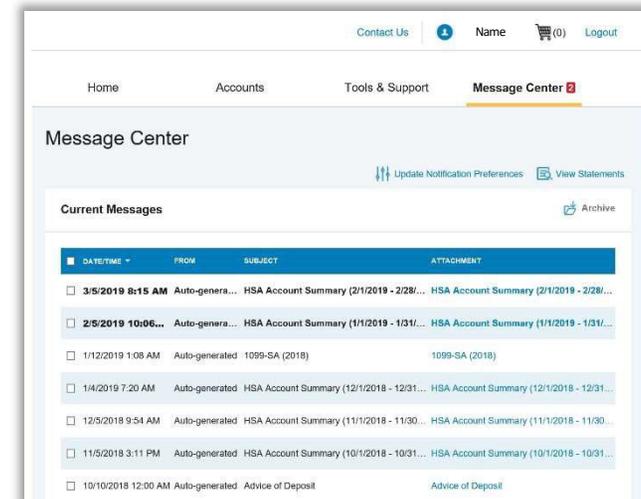
## VIEW OR ACCESS

### DOCUMENTS & FORMS

1. From the **Home Page**, click the **Tools & Support** tab.
2. Click any form or document of your choice.

### NOTIFICATIONS

1. From the **Home Page**, click the **Message Center** tab.
2. Click any link of your choice. You will be able to view and archive current documents, as well as reference documents archived previously.
3. In addition, you can **Update Notification Preferences** by clicking on the link next to **Notifications**.



### Need Additional Set Up Assistance?

Contact us at [CBIZFlex@cbiz.com](mailto:CBIZFlex@cbiz.com).